To Approve Tx Plans Throught the Back Door

- ✓ **Client** (top task bar)
- ✓ On My client
- ✓ Type in Client Name
- ✓ Select Client from Pop Up
- ✓ On Client Name (green)
- ✓ On ▽
- ✓ On Planning
- ✓ On Individual Master Plan
- ✓ Read Interventions
- ✓ On Routing
- ✓ On Routing Actions
- ✓ Type in "OK"
- ✓ On Approve
- ✓ On Refresh

To REVIEW and Approve

- ✓ My Routed Tasks
- ✓ Click on red pencil
- ✓ Check correctness of entry
  - Signature
  - Duration
  - Progress Note
- ✓ Check on Routing
- ✓ Choose Proper Action

To SEND back to submitter

- ✓ Check on SEND ALERT
- ✓ Check on PRIORITY
- ✓ Check on HIGH IMPORTANCE
- ✓ Check on and type in subject or questions for submitter
- ✓ Check on ADD RECORD
- ✓ Check on Staff Name
- ✓ Check on UPDATE
- ✓ Check on SEND

Individual Notes 1:1

- ✓ On My Clients
- ✓ On Client (find client name)
- ✓ on
- ✓ Service Entry an far ® ✓
- ✓ On Add Service
- ✓ On BDIC
- ✓ On Individual Counseling
- ✓ On Date and Time (fill in correct date and time)
- ✓ On Duration
- ✓ On Progress note and enter note
- ✓ On SAVE

How to DELEAT from Group Rosters

- ✓ On Group (top line task bar)
- ✓ On Group (left hand box)
- ✓ On Group Enrollment (little boxes)
  Type in GROUP NAME in
  Find CLIENT Name

- ✓ On ACTION BOX (far RIGHT blue box)
- ✓ On Open Form
- ✓ On END DATE (type in the today's date)
- ✓ On TIME (type in today's time)
- ✓ On SAVE

To FIND a CLIENT

2 Ways to find a client and pull them up:

#1

- ✓ On CLIENT (top TASK BAR)
- ✓ My CLIENT (left hand side Box)
- ✓ My CLIENT
- ✓ On ENTER
- ✓ Select Client

% Client Name

2

- ✓ On MY CLIENTS
- ✓ On FILTER
- ✓ On OPERATOR
- ✓ On CONTAINS BOX

  Type in: %Client Name

  - ✓ On Apply

To Upgrade or add Additional Diagnosis

Go to Widgets – My Clients

Find the client

- ✓ On Client Name
- ✓ On V (far right side of screen)
- ✓ On diagnosis Information
- ✓ On Client Picture
- ✓ On V (far right side of screen)
- ✓ On Diagnosis
- ✓ On Add New
- ✓ On Diagnosis General (drop down box)
- ✓ On Diagnosis *

  Type in diagnosis description
- ✓ On Correct selection
- ✓ On Date and Time (complete)
- ✓ On Priority (Select Secondary)

Go down the page and go to Diagnosed by:

Type in your name as Internal Provider

- ✓ **Save**

Diagnostic Updates

If client in NOT already enrolled in BDIC to to guide "To Enroll in BDIC"

If client is already enrolled in BDIC

- ✓ On My Client on Widgets
- ✓ On ~~Name again~~
- ✓ On drop down box on far RIGHT V
- ✓ On Service Entry
- ✓ On Add New
- ✓ On BDIC
- ✓ On diagnostic Update
- ✓ On all RED * you see and fill in the field.
- ✓ Save after each section

To use Filter to find Client
✓ on Filter
✓ On Contains
Type in %Last Name only
✓ on Apply

If Doesn't work Then Start over
✓ on Filter
✓ on Clear Box (Button)
Then Start Over

To RETREIVE a Diagnostic Update:

- ✓ Go to My Client on Widgets
- ✓ On FIND Client Name
- ✓ On
- ✓ On V on far right hand side of page
- ✓ On Service Entry
- ✓ On Diagnostic Update
- ✓ Safe after each section.

To Enroll in BDIC

- ✓ Go **to My Client** on Widgets
- ✓ On client (type in client's name)
- ✓ Select Client
- ✓ On **Enrollment Information**
- ✓ On First Program Listed – Select Blank Box to the right
- ✓ On **New Program Enrollment**
- ✓ On Program Box to the right
- ✓ On BDIC
- ✓ On Date (fill in)
- ✓ On Time (fill in)
- ✓ Then go down to **SERVICE FACILITY PLACEMENT**
- ✓ On Facility Placement *
  - o Type in BDIC
- ✓ On Unit*
  - o Type in NA
- ✓ Then do down to **WORKER ASSIGNMENT**
- ✓ On Primary Worker*
  - o Type in Donna Stevens
- ✓ On Primary worker's Role *
- ✓ On
- ✓ On Clinical Supervisor
- ✓ On **SAVE**

To Enroll in BDIC Program

- ✓ My Client
- ✓ My Client , find client
- ✓ ~~Type in client name~~ on
- ✓ Select correct client
- ✓ Enrollment Information (Top Tool Bar)
- ✓ If not enrolled in BDIC then
- ✓ On little on Top line
- ✓
- ✓ On New Program enrollment (pop-up)

Fill in all the RED * fields

- ✓ Program
- ✓ Start Date
- ✓ Time
- ✓ Facility Placement
- ✓ On Provider Sites - Service Facility
- ✓ Type in % on facility Name
- ✓ On Search
- ✓ Select BDIC
- ✓ On Unit
- ✓ On NA

Next Section

- ✓ On Primary worker
- ✓ On worker role
- ✓ On Save

Netsmart/myEvolv

- Choose Chrome
- Type in address:

https://myevolvrtcxb.netsmartcloud.com

- Type in User Name: donnastevens
- Type in Password: Loretta
- Check Widgets
- Check My Routed Tasks
- Review Routed Tasks
- Approve-Reject Routed Tasks

Then go to Groups

- Check Groups Widget
  - Search for group
  - Add a service for the group
  - Complete the progress notes
  - Complete individual note
  - Mark clients present

Individual Counseling under Butterfly Drop In Center

- Follow Client>Case Management>Service Entry, Add Service, Expand Butterfly Program
  - ✓ Choose:
    - Individual Counseling
    - Diagnostic Update
    - Push Clinical Note